

Europe Pharmaceutical Warehousing - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Pharmaceutical Warehousing Market size is estimated at USD 24.75 billion in 2024, and is expected to reach USD 36.81 billion by 2029, growing at a CAGR of greater than 8.26% during the forecast period (2024-2029).

The ongoing product innovation & development in the pharma sector and the development of energy-efficient warehousing enhance the opportunity of the global Pharmaceutical Warehousing Market. Switzerland, Germany, and Italy are the leading European hubs for pharmaceutical production (EUR 53.2 billion (USD 56.79 million), EUR 32.3 billion (USD 34.47 million), and EUR 34.3 billion (USD 36.61 million) value, respectively).

Europe is the second-largest biopharmaceutical market in the entire world. The market is ever-expanding because of the rise in population and the persistence of sicknesses.

Germany constitutes the biggest in Europe and the fourth-biggest pharmaceutical market in the world. The high-skilled labor in Germany helps in ramping up production and maintaining quality at the same time.

The growing manufacturing activities from pharmaceutical companies across the European region are predicted to promote the pharmaceutical logistics market in the region.

In January 2022, a pharmaceutical logistics provider in Spain, MOVIANTO, invested around USD 41.88 million in a new center in Numancia de la Sagra (Toledo), which is expected to almost the company's capacity in Spain.

Europe Pharmaceutical Warehousing Market Trends

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Rise in the demand Pharmaceutical

The research-based pharmaceutical industry can play a critical role in restoring Europe to growth and ensuring future competitiveness in an advancing global economy. In 2022, it invested an estimated EUR 44,500 million (USD 47,503 million) in R&D in Europe. Europe is now facing increasing competition from emerging economies, rapid growth in the market, and research environments in countries such as China and Korea. These countries are contributing to the move of economic and research activities to non-European markets. The geographical balance of the pharmaceutical market, and ultimately the R&D base, is likely to shift gradually towards fast-growing emerging economies.

The pharmaceutical industry is the high-technology sector with the highest added value per person employed, significantly higher than the average value for high-tech and manufacturing industries. The pharmaceutical industry is also the sector with the highest ratio of R&D investment to net sales.

Pharmaceutical production in this context amounted to EUR 31.1 billion (USD 33.19 million). Pharmaceutical products were imported for EUR 58 billion (USD 61.91 million) and exported for EUR 82.8 billion (USD 88.38 million). Switzerland, the USA, and the Netherlands are critical suppliers and customers. In Europe, Germany is the pharmaceutical market with the highest turnover, ahead of France, Italy, and Great Britain.

In 2022, 32.5% of EU pharmaceutical exports went to the United States. In 2019, this share stood at 36%.

Increased provision of end-to-end integrated services

Now, several cold chain service providers started offering end-to-end integrated services to end-users in the market. They are providing cold chain management services to customers and participating in their decision-making processes. Many service providers offer end-to-end cold chain management services like inventory management, order scheduling, order forecasting, warehousing, and delivery management.

Logistics providers today are delivering more complex and sensitive products over longer distances and, in some cases, across multiple countries. As a result, there is a heightened demand for tracking technology and cold chain packaging solutions that can protect product integrity and quality throughout deliveries.

Solutions based on Phase Change Technology (PCM) or "thermal batteries" use customized chemicals with specific freezing and melting points (ranging from +18 degrees Celsius for use in chocolates to 25 degrees Celsius for use in ice creams). In comparison to previously used glycols, these materials are designed to be non-toxic and non-flammable and, therefore, apt to be packed alongside food products. The proliferation of dark stores is also emerging as one sustainable option for cold storage.

Europe Pharmaceutical Warehousing Industry Overview

The Europe Pharmaceutical Warehousing market is fragmented in nature, with a mix of global and local players. Most of the imports and exports products need to be monitored in refrigerated transports. Vendors are implementing various strategies, such as strategic alliances, partnerships, mergers and acquisitions, geographical expansion, and product/service launches, to enhance their presence in the market. Major Players include Bio Pharma Logistics, Rhenus SE and Co. KG, GEODIS SA, and United Parcel Service Inc.

Additional Benefits:

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- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Deliverables
- 1.2 Study Assumptions
- 1.3 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS AND INSIGHTS

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 The rise in demand for outsourcing pharmaceutical warehousing services
 - 4.2.2 The demand for efficiency, visibility, and product safety from pharmaceutical companies
- 4.3 Market Restraints
 - 4.3.1 Lack of efficient logistics support in emerging economies
- 4.4 Market Opportunities
 - 4.4.1 Rise in government initiatives to enhance Pharmaceutical Warehousing
- 4.5 Value Chain / Supply Chain Analysis
- 4.6 Porter's Five Forces Analysis
 - 4.6.1 Bargaining Power of Suppliers
 - 4.6.2 Bargaining Power of Buyers/Consumers
 - 4.6.3 Threat of New Entrants
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry
- 4.7 Impact of Covid-19 on the market

5 MARKET SEGMENTATION

- 5.1 By Type
 - 5.1.1 Cold Chain Warehouse
 - 5.1.2 Non-Cold Chain Warehouse
- 5.2 By Application
 - 5.2.1 Pharmaceutical Factory
 - 5.2.2 Pharmacy
 - 5.2.3 Hospital
 - 5.2.4 Others
- 5.3 Geography
 - 5.3.1 Europe
 - 5.3.1.1 Germany
 - 5.3.1.2 UK
 - 5.3.1.3 France
 - 5.3.1.4 Russia
 - 5.3.1.5 Spain

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5.3.1.6 Rest of Europe

6 COMPETITIVE LANDSCAPE

6.1 Market Concentration Overview

6.2 Company Profiles

6.2.1 Alloga

6.2.2 Bio Pharma Logistics

6.2.3 Rhenus SE and Co. KG

6.2.4 DB Schenker

6.2.5 FedEx Corp.

6.2.6 GEODIS SA

6.2.7 Hellmann Worldwide Logistics SE and Co KG

6.2.8 KRC Logistics

6.2.9 Kuehne Nagel Management AG

6.2.10 United Parcel Service Inc.

6.2.11 XPO Logistics Inc.*

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

8 APPENDIX

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